



PureEdge Viewer Training Guide



FORMS CONTENT MANAGEMENT PROGRAM (FCMP)

PureEdge Viewer Training Guide

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PureEdge Viewer Training Guide

Introduction

Army Publishing has taken the first step toward improving the way the Army gathers information in the new century. The PureEdge e-Forms solution not only replaces the technology of traditional forms; it transforms the way the Army conducts business.

PureEdge e-Forms

The exciting PureEdge e-Forms solution is a quantum leap over previous forms software and is far more than simply an electronic form. Under the Forms Content Management Program, the printed form is only one of many potential outputs of the new system. The PureEdge e-Form is an intelligent form that encapsulates the form logic and the underlying data into a single file in a non-proprietary Extensible Markup Language (XML) format. Secure digital signatures, ad hoc routing, and support for online as well as offline users are just some of the benefits of the PureEdge e-Form.

Unlike previous forms software, the data placed into an e-Form is saved with the form itself, rather than saved as a "record" in a database. This means that all of the information you enter into an e-form is kept together in one place, making it easy to manage your forms from wherever you are.

Course Objectives

The purpose of this training guide is to outline the features contained within the PureEdge Viewer. For all personnel supporting the Army mission, the PureEdge Viewer application will provide the interface to allow users to fill, save, print, and email e-Forms. The objectives of this guide are:

- 1. To provide knowledge about e-Forms.
- 2. To provide knowledge about the PureEdge Viewer that displays e-Forms.
- 3. To provide the basic skills to use the PureEdge Viewer.
- 4. To provide the skills to fill, save, print, and email an e-Form.

PureEdge Viewer Overview What is a PureEdge e-Form?

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PureEdge Viewer Overview The PureEdge Viewer

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The PureEdge Viewer Overview What you see in the Viewer

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The PureEdge Viewer Overview The PureEdge Toolbar

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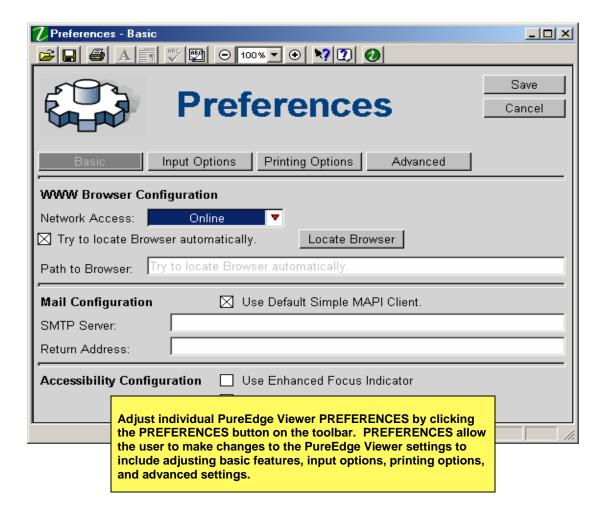
PureEdge Viewer Overview Toolbar Functions



Toolbar Tool Tips



PureEdge Viewer Overview Viewer Preferences



PureEdge Viewer Overview Toolbar Details

Toolbar Button	Description	Shortcut
Open Form	Opens an e-Form in a new window.	Ctrl-O
Save Form	Saves the current e-Form.	Ctrl-S
Print Form	Prints the current e-Form.	Ctrl-P
Email Form	Emails the current e-Form.	Ctrl-M
Preferences	Sets Viewer preferences. This will be done for you during installation.	Alt-F12
Check Spelling	Checks spelling within a single input field. You may add unique words to the dictionary.	Shift-F7
Check All Spelling	Checks all input text you have added to an e-Form.	Alt-F7
Help Mode	Enables context-sensitive help if the e-Form was designed with custom help messages.	Ctrl-H
Viewer Help	Contains keyboard commands for navigating within an e-Form and for using the Viewer.	Alt-F1
About	Displays version and registration information about the Viewer.	Ctrl-Shift-?

PureEdge Viewer Overview Command Buttons

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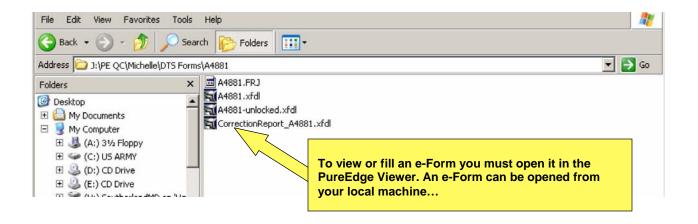
PureEdge Viewer Overview Command Button Details

Command Button	<u>Function</u>	
Save	 Saves the e-Form to the current location and file name. NOTE: If the user opened the e-Form from the My Forms workspace while online at the Army Knowledge Online portal, the e-Form will be saved back to the user's online workspace. If an e-Form has never been previously saved, the user will be prompted to perform a Save As. 	
Save As	Prompts the user for a filename and location before saving the form.	
Print	Prints the current e-Form. Will print blank and/or completed e- Forms to a local or network printer.	
Email	Opens the local email client to permit emailing e-Forms.	
Wizard	Returns user to the e-Form's wizard interface (only appears in select e-Forms).	
< <previous< th=""><th>Returns to the previous page (only appears in multi-page e-Forms).</th></previous<>	Returns to the previous page (only appears in multi-page e-Forms).	
Next>>	Advances to the next page (only appears in multi-page e-Forms).	

PureEdge Viewer Overview Title Bar & Scroll Bars

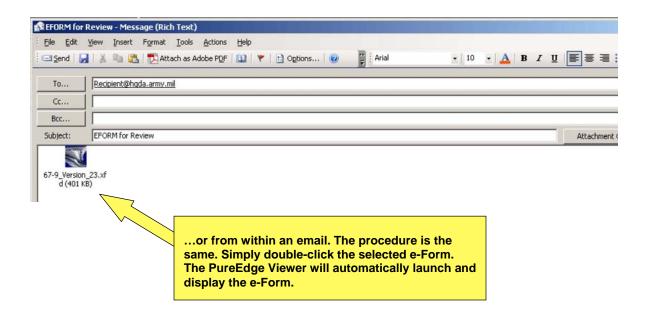
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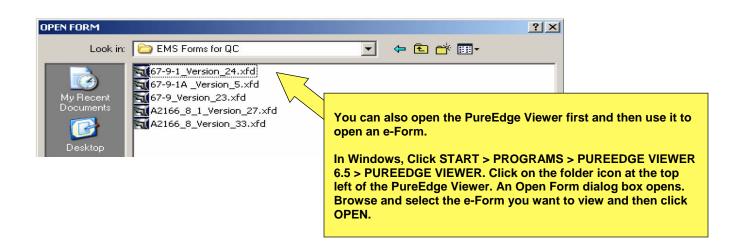
Using PureEdge e-Forms Opening an e-Form



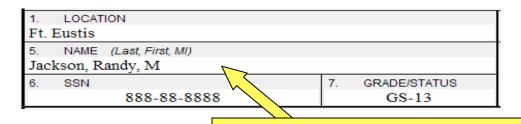


Using PureEdge e-Forms Opening an e-Form





Using PureEdge e-Forms Inputting Text



Filling out an e-Form is similar to filling out a paper form except that you use a mouse and a keyboard to enter text instead of a pen. For example, you can type text into fields with the keyboard and select checkboxes with the mouse or space-bar. Use the tab key to move from field to field or simply use the mouse to reposition the cursor in a selected field.

Text Fields and Other Input Devices

Home Address:

425 Main Street Springfield, OH **FIELD** – A field allows you to provide information by typing text. Some fields allow a single line of text while others support multiple lines.

Check all that apply:

Newspaper

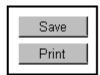
□ Radio

☐ Television

CHECK BOX - Check boxes allow you to make selections from a group of choices. The design of an e-Form will determine if you can make a single choice or multiple choices.

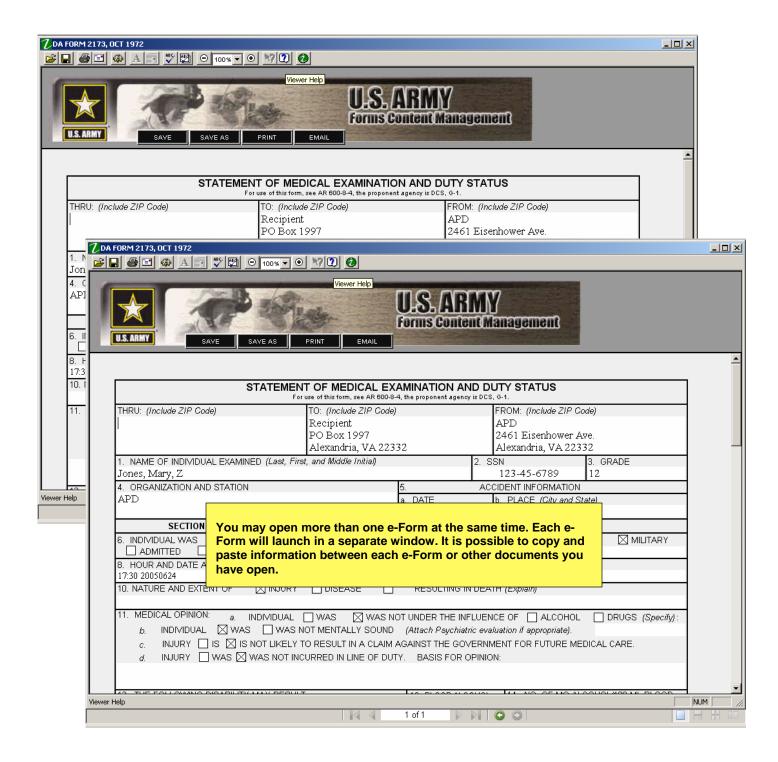


POPUP LIST – A popup presents a list of choices. To make a selection, click the desired choice. Popup lists have a small button that, when clicked, causes the entire list to appear or "popup."

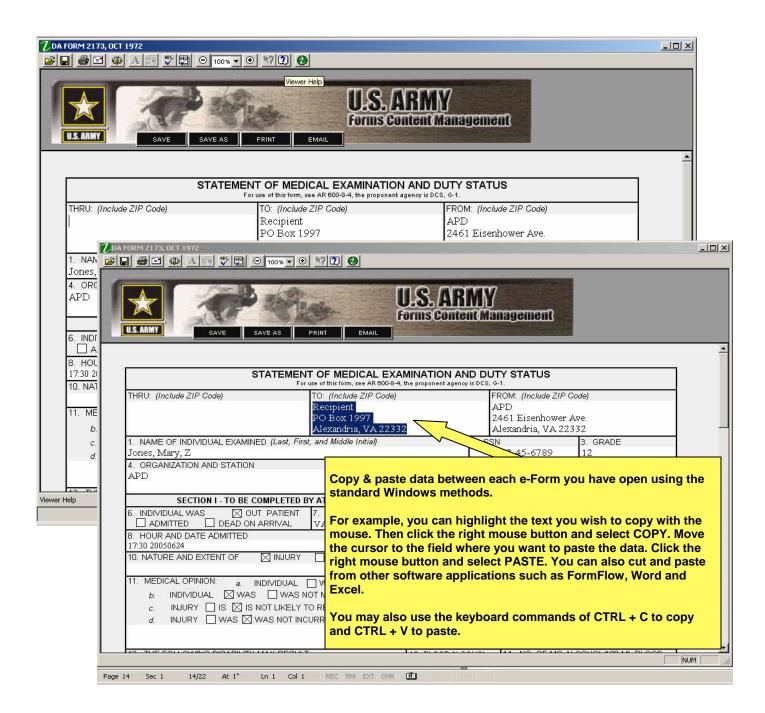


BUTTONS – Buttons are used to perform actions. A user clicks a button to make it active.

Using PureEdge e-Forms Opening Multiple e-Forms



Using PureEdge e-Forms Copying & Pasting



Using PureEdge e-Forms Navigating without a Mouse



PureEdge VIEWER 6.5 for Windows



Help Information

This page contains information that may be helpful while using PureEdge Viewer. If the information on this page does not answer your question, please refer to the PureEdge Viewer User's Manual. You can get a PDF version of this manual from our documentation web site at: http://docs.PureEdge.com

Keyboard Commands

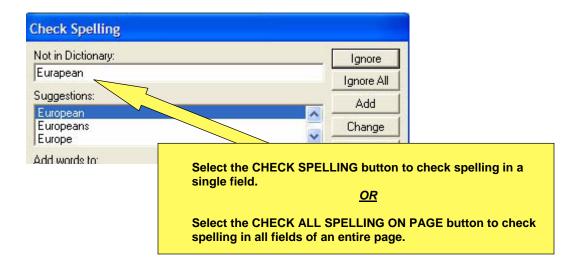
The Viewer features a number of keyboard commands. You can use these keystrokes instead of the mouse to accomplish a number of tasks.

Filling Out a Form

TAB Move forward from item to item in the form.

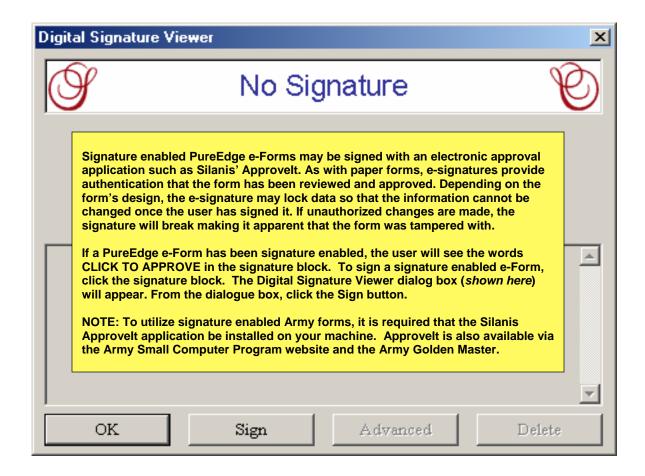
SHIFT + TAB Move backward from item to item in the form.

Spell Checking in an e-Form

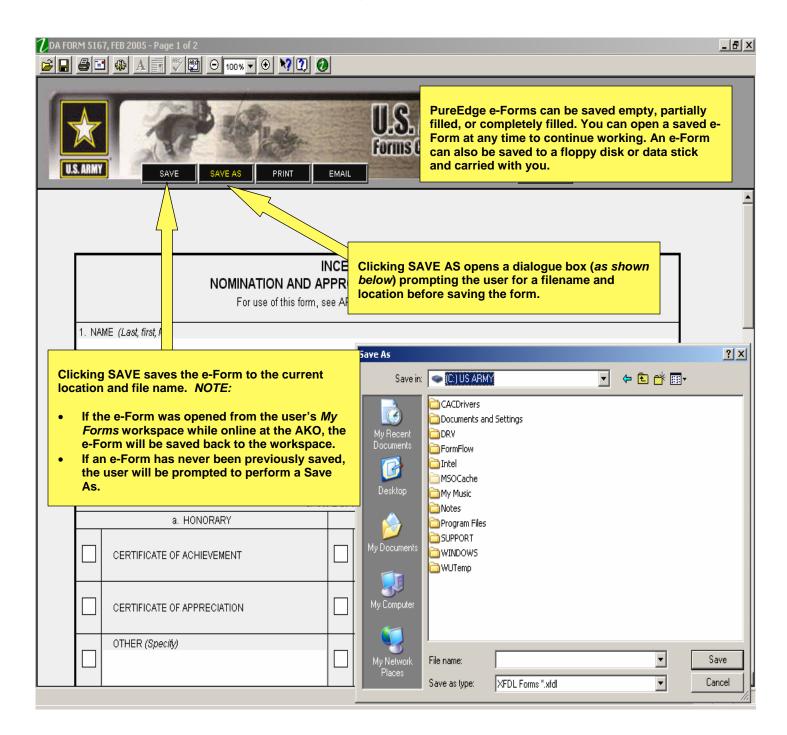


PureEdge Viewer Training Guide

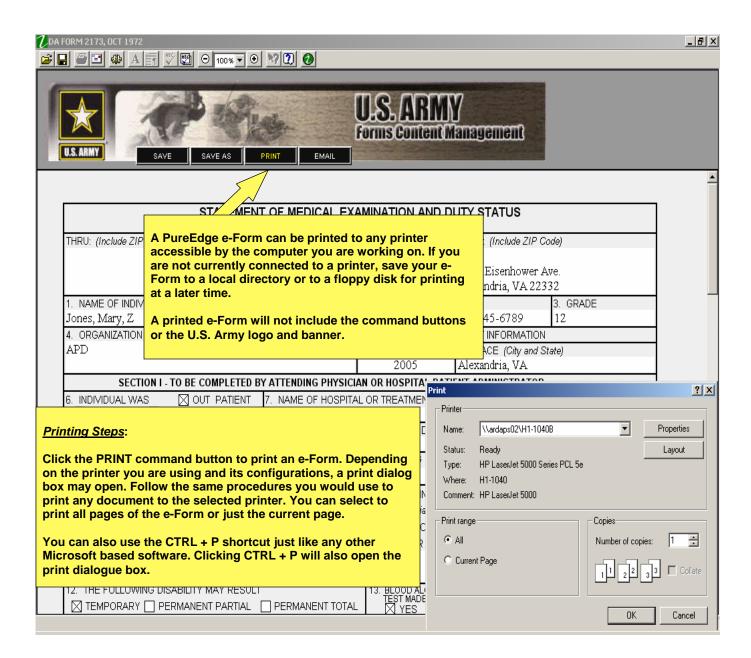
Using PureEdge e-Forms Signing an e-Form



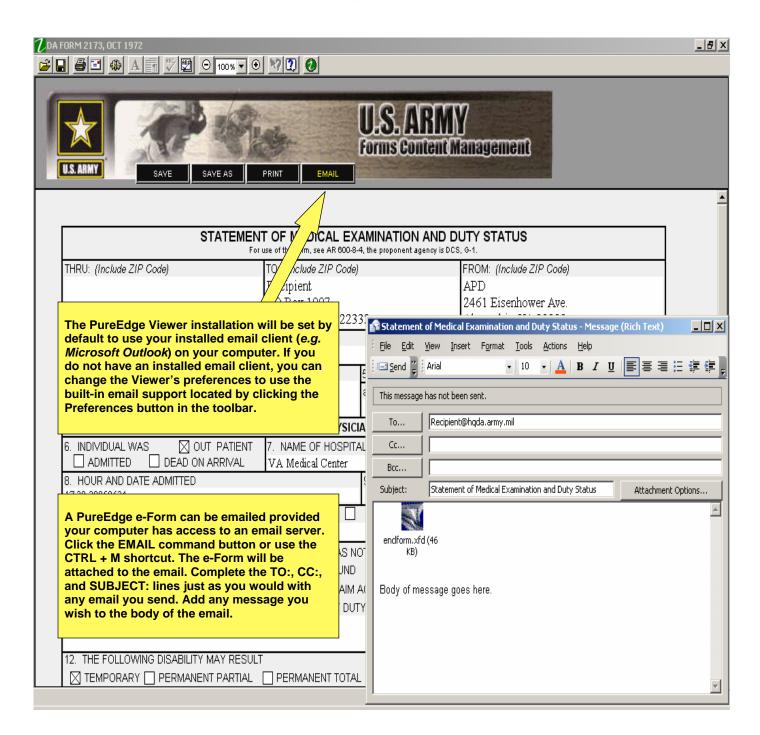
Using PureEdge e-Forms Saving an e-Form



Using PureEdge e-Forms Printing an e-Form



Using PureEdge e-Forms Emailing an e-Form



Frequently Asked Questions

What will replace the Army's FormFlow solution for electronic form design and usage? New PureEdge forms technology will replace the FormFlow software and introduce a new approach for the processing of data through the use of electronic forms.

What is a PureEdge e-Form?

The PureEdge e-Form is the new Army standard format for electronic forms.

What are advantages of the PureEdge Technology?

The PureEdge e-Forms software will provide immediate benefits such as digital signatures, ad hoc routing, and encapsulation of the form with all of its related data. The entire e-Form, including content, is bundled in a single open standards XML document, and can be stored locally or in a centralized database.

How will the PureEdge Viewer be distributed and loaded?

The Army has purchased an enterprise-wide license for the PureEdge Viewer. To load the PureEdge Viewer, Army users must download a file which will install both a browser plug-in and a desktop application on their computer. This download process is very quick but is dependent on the bandwidth of your connection to the network. The PureEdge Viewer is available on the Army Golden Master and the Army Small Computer Program website.

NOTE: Users will need System Administrator rights to install the PureEdge Viewer

What do I need to support the PureEdge Viewer?

- Operating Systems: Windows 98; ME; NT 4.0 sp6a; 2000, sp2, sp3, sp4 and XP sp1, sp2.
- <u>Browser</u>: Internet Explorer 5.01 sp2 or higher, (5.5 sp2, and 6.0 sp1), Netscape Communicator 4.5 – 4.8 or higher; Netscape 6.1, 6.2, 7.0, 7.1, 7.2 or Mozilla 1.7
- Minimum Hardware Requirements:
 - o Processor 500Mhz
 - o RAM 128 MB
 - Download size: 10 MB
 - Disk Space: 40 MB
 - Disk space for installation: 21 MB
 - o Display Resolution: 800 x 600, (1024 x 768 recommended)
 - Estimated Range of File Sizes Transported over the Network: The average size of e-Form documents is between 40k and 400k.

How will I get the e-Forms that I need?

E-Forms will be available through the *My Forms* link on the Army Knowledge Online portal and the APD website.

How do I open an e-Form for viewing?

You can open an e-Form from a floppy disk, CD-ROM, local computer, or over a network. Simply click on the selected e-Form. The PureEdge Viewer software will automatically open and display the e-Form.

Can I have more than one e-Form open at the same time?

Yes, you can have multiple e-Forms open at the same time. Each will be displayed in a separate instance, (window), of the PureEdge Viewer.

Can I copy & paste data between e-Forms?

Yes, the ability to copy & paste between e-Forms is very easy. Use the standard Windows procedures used in Microsoft Word to copy & paste data, (keyboard or mouse procedures).

How do I fill an e-Form?

Filling an e-Form is identical to filling any online document. You simply type your responses into the appropriate fields.

Can I transfer data from my FormFlow forms to PureEdge?

Yes, you can copy & paste data from FormFlow to PureEdge; however, PureEdge e-Forms will not be able to retrieve data stored in a FormFlow data file without the use of custom or third-party software.

How do I navigate inside an e-Form?

When navigating through an e-Form, use the TAB key to move forward from field to field. Use SHIFT + TAB keys to move backwards. You may also use your mouse to position your cursor anywhere in an e-Form. Navigation help is available inside the PureEdge Viewer by pressing the VIEWER HELP button on the toolbar.

Can I partially complete an e-Form or must I complete the entire e-Form at anytime? An e-Form can be partially completed and saved for completion at a later date. You can save an empty e-Form, a partially filled e-Form, or a completed e-Form at anytime.

Can I fill an e-Form when I am not connected to a network?

Yes, an e-form can be filled on a laptop or other computer not connected to a network. E-Forms can be filled while working online or offline.

How do I save an e-Form?

You can save an e-Form to your computer, a network location, or onto a floppy disk. The file size of an e-Form is small enough to save a number of e-Forms on a single floppy disk.

Will my e-Form and the data I enter, be saved in two separate files?

No, each e-Form and all the data you enter will be stored as a single file. E-Forms are very portable and give you the ability to access your e-Form from a floppy disk or from your own computer.

Can I check my spelling?

Yes, click the CHECK SPELLING icon on the toolbar to check a single field. Click CHECK ALL SPELLING ON PAGE to spell check an entire page of e-Form.

Can I customize the Viewer dictionary?

Yes, the dictionary can be customized. When the CHECK SPELLING dialog window is open you may add words to the dictionary.

Can I print an e-Form?

Yes, you can print by clicking the PRINT command button. The e-Form will print without the command buttons, army logo and banner. You can select to print all pages or only the current page.

Can I email an e-Form?

Yes, click the EMAIL command button, or click the EMAIL icon in the toolbar in the toolbar. Your e-Form will be attached to an email that is sent like any other email.

Can I change the Viewer preferences?

Yes, you may click the PREFERENCES button on the toolbar to adjust basic features, input options, print options, and advanced settings within the PureEdge Viewer.

Can I sign an e-Form with an electronic signature?

Users will be able to electronically sign PureEdge e-Forms that have been signature enabled. Signature enabled e-Forms will display the words "Click to Approve" in the signature block field of the form.

Do I need any additional software in order to sign a form?

In order to sign an e-Form, Approvelt software must be installed on your machine. The Army has purchased an enterprise-wide license for the Approvelt application. The software is available on the Army Golden Master and the Army Small Computer Program website.

Note: Users will need System Administrator rights to install Approvelt.

Where can I find more information on the PureEdge Viewer?

Please refer to the PureEdge Viewer User's Manual v6.5 for additional information on the Viewer and its operations.